

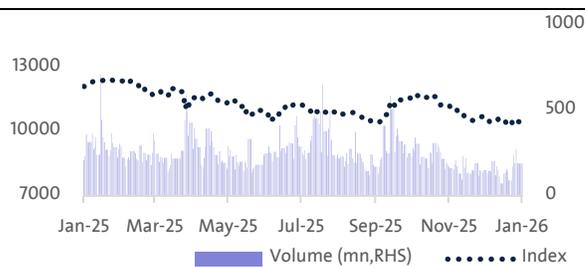


# Daily Market Report

## Key Indices-Return and Valuation

	01-Mar*	DoD	MTD	YTD	P/E	P/BV
TASI	10476	-2.18%	-2.2%	-1%	17.2	1.6
NOMU	22598	-0.86%	-0.9%	-4%	0.0	1.6
S&P500	6909	-0.54%	-0.4%	1%	21.9	5.4
Dow Jones	49499	0.03%	1.2%	3%	15.8	5.6
FTSE 100	10847	0.37%	6.1%	9%	15.8	2.5
EuroStoxx50	6162	-0.19%	3.6%	6%	16.9	2.5
Nikkei225	58753	0.29%	10.2%	17%	24.5	2.8
MSCI EM	1619	0.29%	6.0%	15%	18.0	2.5
SHCOMP	4147	-0.01%	0.7%	4%	16.0	1.6

## TASI- Index and Volume Trends



## Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
01-Mar	15	252	1	0.05:1

## Money Market Yields

%	SAIBOR			Term SOFR		
	01-Mar	Δ bps	YTD Av	27-Feb	Δ bps	YTD Av
1M	4.68	7.3	5.6	3.67	-0.5	4.3
3M	4.88	2.9	5.4	3.67	-0.5	4.3
6M	5.10	-13.2	5.5	3.62	-0.5	4.2
12M	4.80	-2.8	5.2	3.47	0.5	4.0

## Commodities

	Unit	27-Feb	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	71	2.5	80	60	3.2
Brent	USDbbbl	72	2.4	79	59	2.5
Gold	USDOz	5174	0.0	5502	2861	-8.8
Silver	USDOz	94	6.2	117	30	-18.1
Aluminum	USDton	3128	-0.5	3252	2275	-2.9
Copper	USDton	13484	1.5	13952	8590	-5.8

Av=Average, YTD=Year to Date, MTD=Month to Date, DoD=Day Over Day (\*last session relative to session before) \*\*Per 25ton, Source: Bloomberg, TASI

## Saudi Arabia

### Tasnee sells unit for SAR 700M

National Industrialization Co. (Tasnee) signed a Share Purchase Agreement (SPA) with Tahweel Holding for the acquisition of 100% of the share capital of Al-Rowad Industrial Transformation Co., as the enterprise value of the target company is SAR 700 million subject to customary adjustments under the agreement. **(Argaam)**

### CATRION completes 55% AKCC acquisition

CATRION Catering Holding Co. completed the acquisition of 55% equity stake in Al Khalejiah Catering Co. (AKCC), after fulfilling all conditions precedent set out in the agreement. In a statement to Tadawul, the company said it obtained all required regulatory approvals, including approval from the General Authority for Competition (GAC). **(Argaam)**

### Naqi Water announces commercial start of poultry project

Naqi Water Co. started commercial production at the Naqi Poultry Project, following the completion of a 450% increase in the poultry segment's capacity, according to a statement to Tadawul. **(Argaam)**

### Care CEO says higher Q4 2025 topline fueled by patient visits

National Medical Care Co.'s (Care) CEO Abdulaziz Al-Obaid attributed the Q4 2025 profit decline to the reversal of non-recurring legal provisions worth SAR 42 million that had been recognized in the same period a year earlier. In an interview with Argaam, the top executive added that, excluding the impact of these provisions, financial results show strong net profit growth of 71% year-on-year in Q4 2025. **(Argaam)**

### Assets managed via robo-advisors hit SAR 6B, portfolios top 535,000

Assets under management (AUMs) through robo-advisory services provided by licensed fintech companies and financial market institutions in Saudi Arabia rose to SAR 6.42 billion by the end of 2025, up 89% year-on-year (YoY). **(Argaam)**

## Global

### Japan's factory activity hits near 4-year high in February, PMI shows

Japan's manufacturing activity accelerated in February to its fastest pace in almost four years, as robust demand led to sharp increases in output, new orders and employment across the board, a private-sector survey showed on Monday. **(Reuters)**

### China's factory activity set to shrink for second month, hit by depressed demand

China's manufacturing activity probably shrank for a second straight month in February, a Reuters poll showed on Monday, suggesting factory owners are still struggling to turn a profit as weak domestic demand and investment offset resilient exports. **(Reuters)**

## Commodities

### Oil surges, stocks slide as conflict grips Middle East

Oil prices surged on Monday and shares slid as military conflict in the Middle East looked set to last weeks, threatening to upend a global economic recovery and perhaps reignite inflation. Brent jumped 6.4% to \$77.57 a barrel, though it had briefly topped \$82.00 at one stage, while U.S. crude climbed 6.2% to \$71.17 per barrel. Safe-haven gold rose 1.6% to \$5,360 an ounce. **(Reuters)**

### Platts reviewing Mideast crude pricing mechanism amid US, Israel attacks on Iran

S&P Global Platts is reviewing the deliverability of Middle East crude from ports within the Gulf amid heightened safety concerns amid the U.S. and Israeli attacks on Iran, according to a note from the global pricing agency reviewed by Reuters on Monday. **(Zawya)**

# Daily Market Report

## TASI & NOMU- Key Statistics

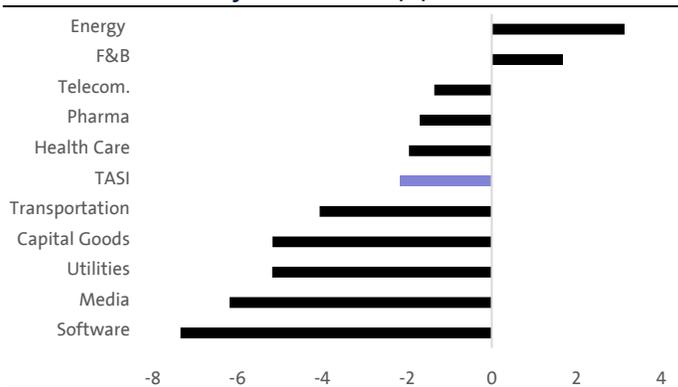
		26-Feb	01-Mar	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2267	2218	-2.2%	-6.7%	-9.1%
Value	mn	6590	6515	-1.1%	-1.1%	38.0%
Volume	mn	264	257	-2.7%	0.0%	8.7%
NOMU						
Market Cap	mn	7353	7353	0.0%	0.0%	-3.1%
Value	mn	12.9	12.8	-1.1%	-1.1%	-33.0%
Volume	mn	1.8	1.7	-6.4%	0.0%	-26.3%

\*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALMARAI	41.5	1.64	4%
SAUDI ARAMCO	25.8	0.84	3%
ALRAJHI TAKAFUL	77	2.5	3%
TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
SRMG	74	-7.85	-10%
ELM	583	-58	-9%
EIC	13.55	-1.18	-8%

Source: Tadawul

## TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

## TASI Market Calendar

Date	Stock/Data release	Event
02-Mar	KESAY CLINICS	Surplus refund date
02-Mar	ALDREES	Ex-dividends date
03-Mar	NAQI	General Assembly
04-Mar	ELM	Ex-dividends date
04-Mar	SABIC	Conference

Source: Argaam, GSTAT

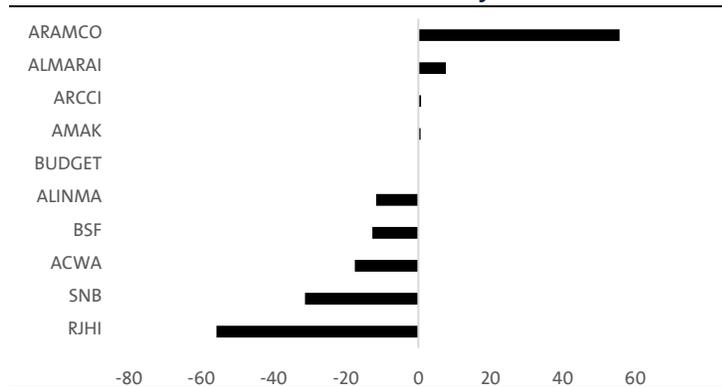
NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
MULTI BUSINESS	8.98	1.25	16%
HORIZON EDUCATIONAL	75.5	7.5	11%
ALASHGHAL ALMOYSRA	20.85	1.89	10%
NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
ALMODAWAT	3.57	-0.48	-12%
KNOWLEDGENET	19.6	-2.6	-12%
ALQEMAM	34.6	-4.2	-11%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.96	-0.09	-4%	41.8
SAUDI ARAMCO	25.8	0.84	3%	21.0
ALINMA	26.88	-1.1	-4%	9.5
TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	25.8	0.84	3%	536
ALRAJHI	97.55	-3.45	-3%	500
SNB	39.9	-1.78	-4%	307

Source: Tadawul

## TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

## Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
03-Mar	E.U.	Consumer price index	Feb	1.9%	
04-Mar	C.Y.	Manufacturing PMI	Feb	50.1	50.1
05-Mar	U.S.	Initial job claims	Feb	3.3%	
06-Mar	U.S.	Average hourly earnings	Feb	0.3%	0.1%
10-Mar	U.S.	Existing Home Sales	Feb	4.16M	4.27M

Source: Bloomberg, Investing.Com

## Daily Market Report

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